

TM-2 PREPARER COURSE

USING NASA'S TRAVEL MANAGER SYSTEM

COPY A TRAVEL AUTHORIZATION

This document covers the steps to copy an existing travel authorization

The document can be renamed and/or the traveler can be changed.

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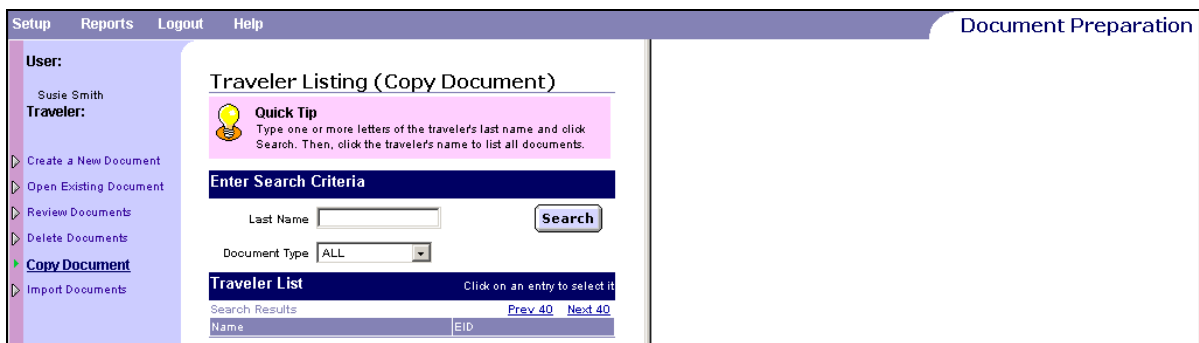
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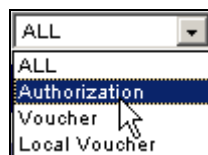
A. COPY DOCUMENT



1. Click the **Copy Document** link on the Document Processing Toolbar on the left side of the page.
2. The **Traveler Listing (Copy Document)** page is displayed.



3. Specify the type of document to copy by selecting **Authorization** in the **Document Type** pull down list. Only documents of that specific type will be displayed for copying. "All" is the default.



4. Enter the traveler's last name in the **Last Name** field and press the **Search** button next to the **Last Name** field. A list of travelers will display on the left side under the **Traveler List** area.


The screenshot shows the DFRC Travel Manager web interface. The top navigation bar includes 'Setup', 'Reports', 'Logout', and 'Help'. The main header is 'Document Preparation'. On the left, a sidebar lists user actions: 'Create a New Document', 'Open Existing Document', 'Review Documents', 'Delete Documents', 'Copy Document' (highlighted), and 'Import Documents'. The main content area is divided into two sections. The left section, 'Traveler Listing (Copy Document)', contains a 'Quick Tip' about searching by last name, an 'Enter Search Criteria' form with 'Last Name' and 'Document Type' (set to 'Authorization') fields, and a 'Search' button. Below this is a 'Traveler List' table with columns 'Name' and 'EID'. The right section, 'Document Search (Copy Document)', contains a 'Document List' table with columns 'Type', 'Document Name', 'Dep Date', 'Status', and 'In Use'. The 'Traveler: John Doe' is selected.

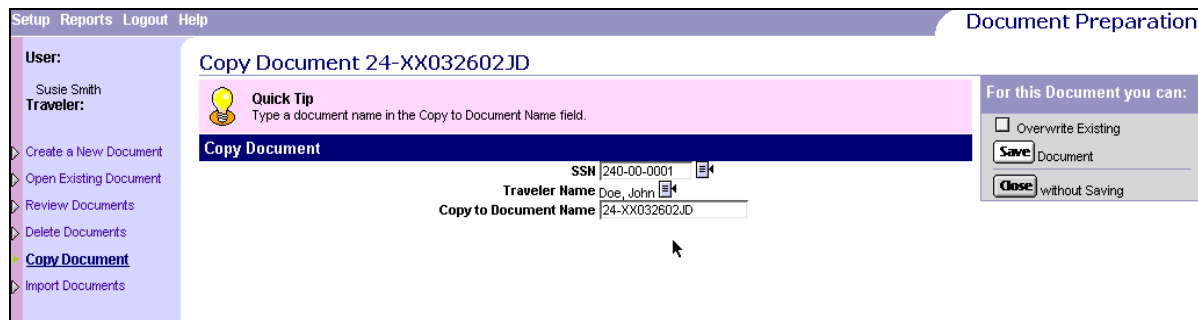
Type	Document Name	Dep Date	Status	In Use
Authorization	24-XX032602.ID	03/26/02	SIGNED	

Name	EID
Doe, John	240-00-0001

5. Click the **Next 40** and/or **Prev 40** links under the **Search Results** area to page forward and backward through the list of travelers.
6. Click the **Name** link of the traveler whose travel document is to be copied. All documents created for that traveler will be displayed in the **Document Search (Copy Document)** area on the right.


This screenshot is identical to the previous one, but with a mouse cursor clicking on the 'Doe, John' link in the 'Traveler List' table. The 'Document Search (Copy Document)' section on the right remains unchanged.

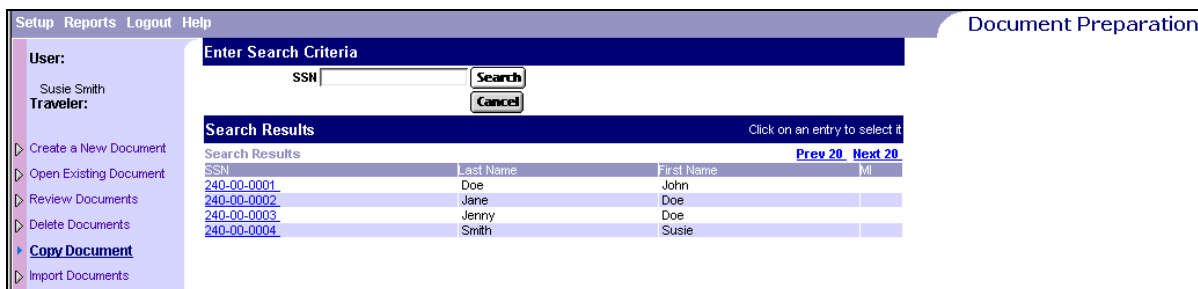
7. Click the **Document** icon  of the document to be copied from the list. The **Copy Document** page will be displayed.




NOTE

*Do not use the **Overwrite Existing** check box, in the 'For this Document you can:' area in the top right, unless the document that will be overwritten has not been routed.*

8. Click the **SSN Lookup** or **Traveler Name Lookup** icons  to retrieve the desired traveler. The **Enter Search Criteria** page will be displayed.



SSN	Last Name	First Name	
240-00-0001	Doe	John	<input type="checkbox"/>
240-00-0002	Jane	Doe	<input type="checkbox"/>
240-00-0003	Jenny	Doe	<input type="checkbox"/>
240-00-0004	Smith	Susie	<input type="checkbox"/>

9. Enter the last name or a portion of the last name of the traveler in the **Last Name** field of the **Enter Search Criteria** area and click the  button to the right of the field. The **Search Results** will be displayed again beginning with the last name of the value entered.

10. Scroll through the list and click the **SSN** link next to the desired traveler. The **Copy Document** page will be displayed with the new traveler's name for the document.

The screenshot shows the 'Copy Document' page. The left sidebar contains a menu with options: 'Create a New Document', 'Open Existing Document', 'Review Documents', 'Delete Documents', 'Copy Document' (highlighted), and 'Import Documents'. The main content area is titled 'Copy Document 24-XX032602JD'. It includes a 'Quick Tip' box stating: 'Type a document name in the Copy to Document Name field.' Below this, there are input fields for 'SSN' (240-00-0002), 'Traveler Name' (Jane, Doe), and 'Copy to Document Name' (24-XX032602JD). On the right, there is a section titled 'For this Document you can:' with two buttons: 'Save Document' and 'Close without Saving'.

11. Click the **Save Document** button in the 'For this Document you can:' area in the top right. A pop-up message stating the copy process is complete will be displayed.

The screenshot shows a pop-up window titled 'Information Message'. The message text reads: 'Copy Document Completed.' Below the message is a 'Close' button.

12. Click the **Close** button in the pop-up message window. The **Traveler Listing (Open Document)** page will be displayed again.

The screenshot shows the 'Traveler Listing (Open Document)' page. The left sidebar contains a menu with options: 'Create a New Document', 'Open Existing Document' (highlighted), 'Review Documents', 'Delete Documents', 'Copy Document', and 'Import Documents'. The main content area is titled 'Traveler Listing (Open Document)'. It includes a 'Quick Tip' box stating: 'Type one or more letters of the traveler's last name and click Search. Then, click the traveler's name to list all documents.' Below this, there is a section titled 'Enter Search Criteria' with input fields for 'Last Name' and 'Document Type' (set to 'ALL'), and a 'Search' button. Below the search criteria, there is a section titled 'Traveler List' with a table showing search results. The table has columns for 'Name' and 'EID'. The search results show 'Jane, Doe' with 'EID' 240-00-0002. There are links for 'Prev 40' and 'Next 40'.

B. OPEN THE COPIED DOCUMENT

Traveler Listing (Open Document)

Quick Tip
Type one or more letters of the traveler's last name and click Search. Then, click the traveler's name to list all documents.

Enter Search Criteria


Last Name

Document Type

Traveler List Click on an entry to select it

Search Results [Prev 40](#) [Next 40](#)

Name	EID

1. Enter the last name, or portion of the name, for the desired traveler in the **Name** field of the **Traveler Listing (Open Document)** page.
2. Click the  button next to the **Last Name** field. All travelers whose last names begin with the last name value entered will be displayed in the **Traveler List** area.
3. Click the **Next 40** and/or **Prev 40** links in the **Traveler List** area to page forward and backward through the list of travelers.
4. Click the **Name** link of the traveler for which the above authorization was copied. All documents created for that traveler will be displayed in the **Document Search (Open Document)** area on the right.

Document Search (Open Document)

Quick Tip
Type one or more letters of the traveler's last name and click Search. Then, click the traveler's name to list all documents.


Enter Search Criteria


Last Name

Document Type

Document List Click on an entry to select it

Traveler: Doe Jane

Type	Document Name	Dep Date	Status	In Use
	Authorization	24-XX032602JD	03/26/02	CREATED

5. Click the **Document** icon  for the Authorization name copied above. The **Document Summary** page for the copied travel authorization will be displayed.

6. The travel authorization is the same as the original except for the following.
 - a. Name of the traveler and/or name of document.
 - b. Other Authorizations.
7. Make the necessary changes to the new document, save the changes, sign and route the document.

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Setup Reports Logout Help

User: Susan Smith

Traveler: John Doe
Authorization: 24-XX032602JD

Document Summary

- Traveler
- Itinerary
- Ticketed Trans
- Expenses
- Lodging/M&IE
- Accounting
- Totals
- Comments
- Document Status
- Perform Pre-Audits
- Preview Document
- Export Document
- Close Document

Document Summary for Authorization 24-XX032602JD

Quick Tip
For specific information, click on a Details link. You can sign and stamp your document from the Document Status section.

Travel Authorization Number
[Traveler Details](#) 240-00-0001, John Doe

Purpose Description 5 Days training in Montgomery, AL
[Itinerary Details](#) MONTGOMERY,AL 03/26/02 - 03/30/02
[Ticketed Trans Details](#) \$350.00

[Expense Details](#)

Edit	Delete	Date	Expense	Amount
		03/26/2002	TAXI	20.00
				Total: 20.00

[Lodging/M&IE Details](#) \$415.00
[Other Authorizations Details](#) Taxi at TDY Authorized

[Accounting Details](#)

Label	Amount
23-AS5003	785.00
Total:	785.00

[Totals Details](#)

Disbursement Type	Amount
Estimated Cost	785.00
Advance Requested	0.00

[Enter Comments](#) Voucher due 5 days after completion of your trip
[Document Status](#)


For this Document you can:

Save Document
Continue Entering Document
Close Current Document

Enter Status/PIN to stamp this document

NOTE

This document can be modified and routed. Make sure all required information is included on the document for each individual Traveler.

8. Click the  **Current Document** button, in the 'For this Document you can:' area in the top right, if the document will not be routed at this time.